



FISO Central Bedfordshire Provider Portal

Funding and Forms User Guide

27th January 2015

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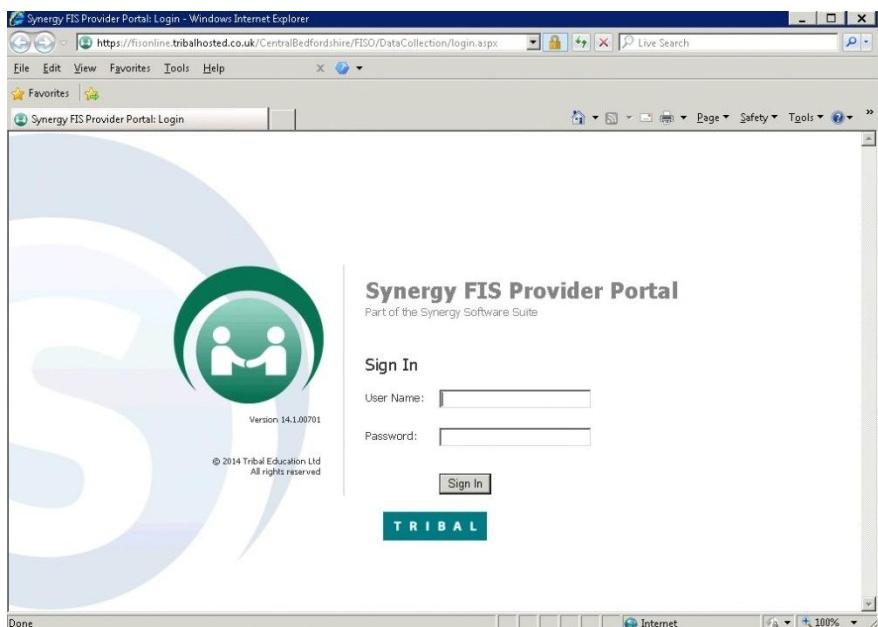
1. Provider Portal – Logging in and out

Go to the Central Bedfordshire Council Provider Portal webpage

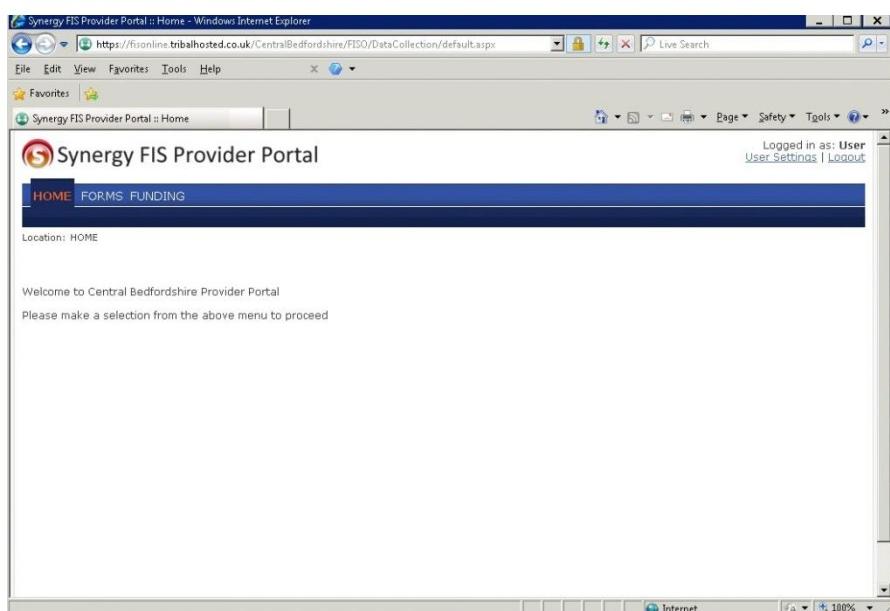
<https://synergy6.tribalhosted.co.uk/CentralBedfordshire/FISO/ProviderPortal/login.aspx>

Please note that the above link may change in the future, we will however, notify you of all changes to the system. If in doubt you can visit the Central Bedfordshire Council website to find the most up-to-date link or contact us at cpeadmin@centralbedfordshire.gov.uk.

To access the Nursery Education Funding online system you need to enter your user name and password and click Sign In. Please see screenshot below:



You will then be presented with the following home page.

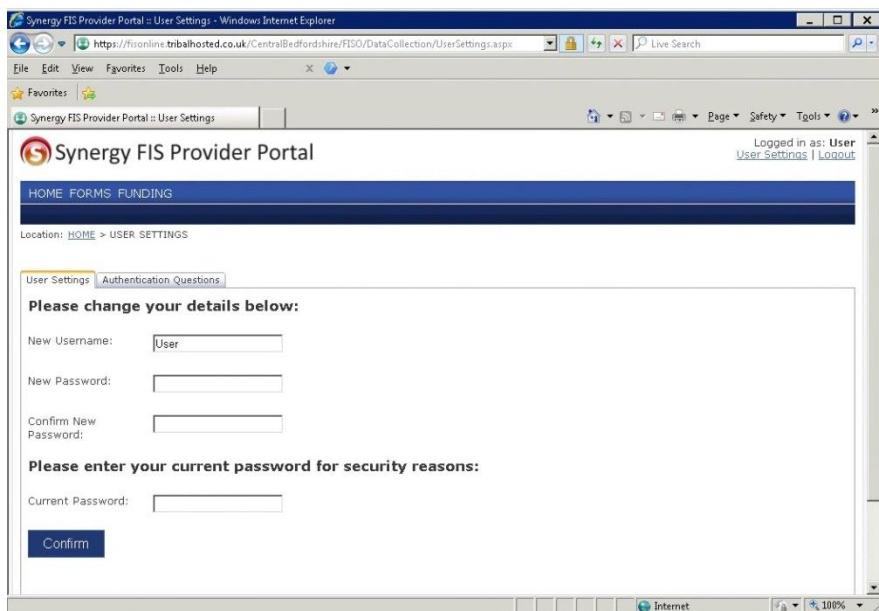


To navigate to the Nursery Education Funding menu options you need to click on the Funding tab. To navigate to your online forms (Notification of Early Leaver, Changes to staff highest qualification, Early Years Census etc) you need to click on the Forms tab. To log out of the portal you need to click on the Logout link on the top right-hand side of the screen.

2. Provider Portal - User Settings

The portal allows a provider to change their username and password. In order to do this you need to select the User Settings link on the top right-hand side of the screen. You can then enter a username and password that is suitable for you. It is important that you change your password immediately when you first log into the portal. Click the Confirm button to confirm any changes.

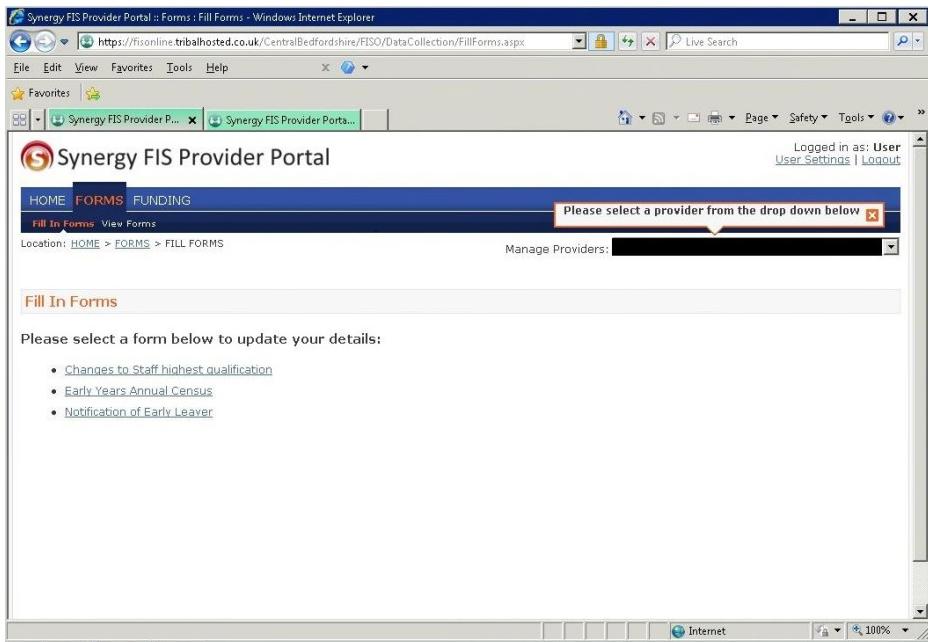
Please keep your username and password in a secure place. If at anytime you forget them, you can email the Business Support team at cpeadmin@centralbedfordshire.gov.uk. They will then be able to reset your password and inform you of your username.



The screenshot shows a Windows Internet Explorer window displaying the 'Synergy FIS Provider Portal :: User Settings' page. The URL in the address bar is <https://frontline.tribalhosted.co.uk/CentralBedfordshire/FISO/DataCollection/UserSettings.aspx>. The page has a blue header bar with 'HOME FORMS FUNDING' and a navigation bar below it showing 'Location: HOME > USER SETTINGS'. There are two tabs: 'User Settings' (which is selected) and 'Authentication Questions'. A message 'Please change your details below:' is displayed above a form. The form contains fields for 'New Username' (set to 'User'), 'New Password', and 'Confirm New Password'. Below the form, another message 'Please enter your current password for security reasons:' is shown, followed by a 'Current Password' field and a 'Confirm' button. At the top right of the page, it says 'Logged in as: User' with links for 'User Settings' and 'Logout'. The status bar at the bottom of the browser window shows 'Internet' and '100%'. The overall layout is a standard web-based user interface.

3. Provider Portal – Forms

To update your online forms you need to click on the Forms Menu tab and then click on the Fill in Form menu. You will find all your relevant forms listed on the screen. This list may change as we update and add forms throughout the year. Please see screenshot below:



Click on the form that you wish to enter and enter all the required information as necessary. You may find that some questions on a form are mandatory, which will be indicated with a red asterisk or a red box. You will not be able to submit your form until these questions are completed.

Please note the form will not save any changes you have made until you have clicked on the Submit form button. You can navigate from one page to another but if you exit the form without submitting, all information you have entered will be lost.

A screenshot of a navigation bar. On the left is a 'Previous Page' button. In the center is a dropdown menu labeled 'Select page: Section 1: Provider Details' with an arrow pointing down. To the right of the dropdown are two small buttons: a left arrow and a right arrow.

You can navigate through the form by either clicking on the Next page or Previous page button or by selecting a specific page in the drop down list option at the top or bottom of the page. Once you have selected the page that you want, you then need to select the arrow button to jump to that specific page.

When you have completed your form you must select the Submit Form button on the form. A message will pop up to let you know that the form has been sent successfully.



This will trigger an email to the cpeiadmin@centralbedfordshire.gov.uk email inbox, to let the Business Support team know that a provider has submitted some information.

After you have clicked on the Submit From button the form will be held in the “View Forms” menu section on the Provider Portal. Here you can view all previously submitted forms and their status, whether it is Denied, Pending or Authorised. Please see below an example of what you may see:

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there is a navigation bar with links for HOME, FORMS (which is highlighted in orange), and FUNDING. Below the navigation bar, there are links for 'Fill In Forms' and 'View Forms'. The 'View Forms' link is underlined, indicating it is the current section. On the right side of the header, it says 'Logged in as: Daffodil' with links for 'User Settings' and 'Logout'. A message box in the center of the header area says 'Please select a provider from the drop down below'. Below the header, the URL 'Location: HOME > FORMS > VIEW FORMS' is displayed. To the right, there is a dropdown menu labeled 'Manage Providers' with 'Daffodil Day Nursery (Day nursery)' selected. The main content area is titled 'View Forms' and contains a sub-section titled 'Select a form below to view:'. Underneath this, there is a bulleted list of five items, each representing an 'Early Years Annual Census' entry with a timestamp and status (Pending). The list includes:

- Early Years Annual Census (12/01/2014 23:38:16 - Pending)
- Early Years Annual Census (12/01/2014 23:36:01 - Pending)
- Early Years Annual Census (12/01/2014 23:35:34 - Pending)
- Early Years Annual Census (12/01/2014 23:29:17 - Authorised)
- Early Years Annual Census (12/01/2014 23:28:30 - Pending)

If for whatever reason there is a problem with the form, the form will be denied and an email will be sent to you to explain the reasons why. The form could be denied for many reasons, e.g. you have completed the wrong questions or the Data Protection Statement, if applicable has not been accepted.

IMPORTANT: If a form is denied you will need to re-enter and submit the form again, so it is very important you get it right first time. Please double check all pages before you click on the Submit Form button on the online form.

To re-enter a form you need to click on the “Fill in Forms” section on the Provider Portal and start the above process again.

4. Provider Portal – Funding

To view funding information click on the Funding tab at the top of the screen.

Summary	Year	Term	Funding Type
View	NEF 2012/13	2012 Period 1 - Autumn	Fully Flexible

Once you have clicked on the Funding menu you should see 4 or 5 menu options, the number of menu options depends on whether you are a provider offering the stretched entitlement or a term time only provision. If you offer the ability for the parent to choose to stretch their entitlement, you will see an additional menu called Termly Funding Dates. For the purposes of this guide, two providers will be used: Daffodils Day Nursery, offers the stretched entitlement and Daisy Pre-school, which is a term-time only setting.

4.1. Termly Funding Dates section

In this section a provider can record the dates within a term that they are closed. For each year/term selected, it is possible to define dates within the term that are not to be counted towards the funding total. A provider can populate these dates in the Termly Funding Dates section on the Provider Portal.

The screenshot shows a Windows Internet Explorer window for the Synergy FIS Provider Portal. The URL is https://fisonline.tribalhosted.co.uk/CentralBedfordshire/FISO/DataCollection/NEFHeadcount. The user is logged in as 16024nef99999. The page title is 'Synergy FIS Provider Portal'. The navigation bar includes 'HOME', 'FUNDING' (which is selected), 'Summary', 'Termly Funding Dates', 'Estimates', 'Actuals', and 'Adjustments'. The location is 'HOME > FUNDING > TERM DATES'. A dropdown menu says 'Please select a provider from the drop down below'. The manage providers dropdown shows 'Daffodils Day Nursery (Day nursery)'. Below this, a message says 'Submit Exclusion Dates: NEF 2012/13 2012 Period 1 - Autumn (Term Dates: 03-Sep-2012 to 28-Dec-2012)'. There is a table with columns 'Request Delete', 'Status', and 'Exception Date'. The data in the table is:

Request Delete	Status	Exception Date
Request Delete	Unchanged	24-Dec-2012
Request Delete	Unchanged	25-Dec-2012
Request Delete	Unchanged	26-Dec-2012
Request Delete	Unchanged	27-Dec-2012
Request Delete	Unchanged	28-Dec-2012

At the bottom are 'Add Date' and 'Confirm Date(s)' buttons.

The purpose of the exception dates is to enable the Business Support team to workout which days within the term the provider should be counting towards funding.

4.2. Estimates section

Each term the provider will need to estimate the number of hours they expect children to attend with them per week for the term. Select Estimates option to input or amend current estimates. The Business Support team will send the provider a reminder of when this needs to happen. In order to send an estimate of your total funded hours, a provider needs to select the Estimates menu. If an estimate has already been sent and paid the link will be set to View. If it is available for a provider to send to the Business Support team the link will be set to Open.

The screenshot shows a Windows Internet Explorer window for the Synergy FIS Provider Portal. The URL is https://fisonline.tribalhosted.co.uk/CentralBedfordshire/FISO/DataCollection/NEFHeadcount. The user is logged in as 16025nef88888. The page title is 'Synergy FIS Provider Portal'. The navigation bar includes 'HOME', 'FUNDING' (selected), 'Estimates', 'Actuals', and 'Adjustments'. The location is 'HOME > FUNDING > ESTIMATES'. A dropdown menu says 'Please select a provider from the drop down below'. The manage providers dropdown shows 'Daisy Pre-School (Pre-school)'. Below this, a message says 'Provider Headcount Records'. There is a table with columns 'Estimates', 'Year', 'Term', and 'Funding Type'. The data in the table is:

Estimates	Year	Term	Funding Type
Open	NEF 2012/13	2012 Period 1 - Autumn	Non Flexible

At the bottom are 'Previous' and 'Next' buttons, and a message '[1 Result]'. The status bar shows the date as 06/15.

To send in your estimate return, please do the following:

- Enter the number of weeks in the term, if this is not already done for you.
- Input Estimate Funded Hours and Select Calculate
- Total Number of Hours for the Term will be calculated

Synergy FIS Provider Portal :: Funding - Windows Internet Explorer
https://fisonline.tribalhosted.co.uk/CentralBedfordshire/FISO/DataCollection/NEFHeadcount

File Edit View Favorites Tools Help

Favorites Suggested Sites Free Hotmail

Synergy FIS Provider Portal :: Funding

Logged in as: 16025nef888888 User Settings Logout

HOME FUNDING Summary Estimates Actuals Adjustments

Location: HOME > FUNDING > ESTIMATES Manage Providers: Daisy Pre-School (Pre-school)

Submit Estimate: NEF 2012/13 2012 Period 1 - Autumn - Non Flexible

Number of Weeks for this Term Estimate Number of Funded Hours Per Week for this Term There are 4,200.00 Hours in this Term
Please enter both numbers, click 'Calculate', then 'Send Claim'

Calculate Send Claim

- Select Send Claim. Once you have sent your estimates a green confirmation box will appear on screen to let you know that the submission has been successful.



Submission Successful

4.3. Actuals section

The Actuals section is where a provider can edit and submit actual headcount information for the term. If the headcount information is set to pay or already paid to the provider, the provider will only have access to View the information. They will not be able to edit or re-submit children in the list. If the provider requires additions or amendments to be made they must contact the Business Support Team. If the Actuals section is available to edit or submit the link will be Open.

- Select Actuals option to input or amend current pupil details
- Click on the Open link.

Synergy FIS Provider Portal :: Funding

Please select a provider from the drop down below

Actuals	Year	Term	Funding Type
Open	NEF 2012/13	2012 Period 1 - Autumn	Fully Flexible

Previous | Page: 1 | Next [1 Result]

Done Citrix XenA... Inbox - Mic... Synergy FIS ... User Guides... FISO Provid... Calculate cl... 06:25

If children are already attached to the provider they will be shown in the list.

The screenshot shows a Windows Internet Explorer window for the Synergy FIS Provider Portal. The URL is https://fisonline.tribalhosted.co.uk/CentralBedfordshire/FISO/DataCollection/NEFHeadcount. The page title is "Synergy FIS Provider Portal :: Funding". A message box at the top right says "Please select a provider from the drop down below". Below it, a dropdown menu shows "Manage Providers: Daffodils Day Nursery (Day nursery)". The main content area is titled "Submit Actual: NEF 2012/13 2012 Period 1 - Autumn - Fully Flexible". There are two buttons: "Add Child" and "Send Claim". A table lists children with columns: Status, Child Name, Date of Birth, Funded Hours for Term, and Non-Funded Hours for Term. The table includes rows for Bucket, Stig; Garcia, Felix; Gold, Hyacinth; Goldsmith, Poppy; Jovi, Mario; Marcelin, Marcus; Sanchez, Maria; Shakespeare, Capitano; Tyson, Paul; and Wonder, Stephanie.

4.3.1. Deleting a child

Select Request Delete link to remove a child from the Actual Headcount. A message will pop up asking if you are sure. Click on Yes to confirm deletion.

The screenshot shows the same Synergy FIS Provider Portal window. A modal dialog box titled "Request Delete" appears in the center. It contains the text: "Are you sure you want to request the deletion of child: Shakespeare, Capitano from this headcount record? Delete requests are automatically submitted but can be cancelled." At the bottom of the dialog are two buttons: "Yes" and "No". The background table of children is partially visible.

This will not remove the child from the list automatically. A message will be sent to the back office for authorisation. Once the deletion is accepted the child will be removed from your list of children.

4.3.2. Adding a new child

- Select Add Child to add a new child to the list, you can then complete the child information. More details of this are explained in the Child Details tab and Funding Details tab section of this guide.
- Once you have completed the child information click on Save.
- Repeat process as required

4.3.3. Editing an existing child

To edit a child in the list, you need to click on the Edit link. When editing a child, please check the details that are already in there to make sure that they are correct. Please especially note spelling mistakes in their name and incorrect addresses.

Within the child's information some fields will have a black asterisk next to them. This means that this field must be completed (if available) before you save the record. If a mandatory field is empty when you click the Save button, error messages will appear at the bottom of the screen. The error message will let the provider know when field has been missed off. A red asterisk will also appear next to the field to inform the Provider, which field needs to be completed. When a provider clicks on the Edit link to view the child's information the portal will automatically show the Funding Details tab.

Day	Hours
Monday	6.00
Tuesday	6.00
Wednesday	0.00
Thursday	0.00
Friday	0.00
Saturday	0.00
Sunday	0.00

4.3.4. Funding Details tab

- Present during Census – Needs to be ticked always.
- Term Start Date* - This is the start date of the child for the current term.
- Term End Date* - This is the end date of the child for the current term. If the child is an early leaver put the last date of when they leave.
- Attends Two Days or More – This is ticked if the child attends your provision over two or more days.
- Weeks Attended in Term* – This is the number of weeks a child has attended your provision. If a child starts part way through the week, then you need to round it up to the nearest full week. If this field is greyed out it means that the child is on the stretched attendance. Once this is greyed out the number in the box is not used.
- Funded Hours per Week* - This is the number of funded hours per week a child is claiming for. If this field is greyed out it means that the child is on the stretched attendance. Once this is greyed out the number in the box is not used.
- Non-Funded Hours per Week* - This is the number of hours per week that the child is paying for. We require this for Audit Purposes.
- Stretched offer – The provider needs to tick this box if a child is on a stretched attendance. Please note that when this box is ticked the Weeks Attended in Term and the Funded Hours per Week is greyed out. If you un-tick this box, the stretched attendance fields are greyed out and the Weeks Attended in Term and the Funded Hours per Week are available for the Provider to use. Once the fields are greyed out the information is not used.
- Monday to Sunday – The provider needs to enter the number of funded hours the child attends on each day. The daily hour's total, in conjunction with the attendance date range, and the provider exception dates, will determine funding hours for the term.

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there's a navigation bar with links for Home, Funding, Summary, Termly Funding Dates, Estimates, Actuals, and Adjustments. Below this, a message box says 'Please select a provider from the drop down below'. The main form is titled 'Child Details' and contains fields for Forename (Felix), Middle Name, Surname (Garcia), DOB (14-Feb-2008), Proof of DOB (checkbox), Gender (Male/Female), Preferred Surname, Ethnicity (Not obtained (NOBT)), and SEN COP Stage (No Special Educational need). To the right, there are fields for Address Line 1 (Stratton Upper School & Commu), Address Line 2 (Eagle Farm Road), Address Line 3, Locality, Town (Biggleswade), County (Bedfordshire), and Postcode (SG18 8JB). At the bottom, there are 'Save' and 'Cancel' buttons, and a note that asterisks denote mandatory fields. The status bar at the bottom shows various system icons and the date 06/07.

4.3.5. Child Details tab

- Forename* - The given name of the child
- Middle Name – If known, this is not a mandatory field
- Surname* - The child's legal surname.
- DOB* - Date of Birth of the child. Please note that if the child falls out of the eligible birth dates, the portal will return an error message informing you of this.
- Proof of DOB – Even though this is not a mandatory field, we ask that you complete for all children. This requirement is part of our Code of Practice.
- Gender* - Please tick Male or Female.
- Preferred Surname – Please enter if indicated on the parent declaration form.
- Ethnicity – Please select an option from the drop-down.
- SEN COP Stage – Please select an option from the drop-down.
- Address fields – Please fill in as much details of the address as you can. Once we receive the address details we will check that the address and postcode is correct. If it isn't, the Business Support team will let you know.

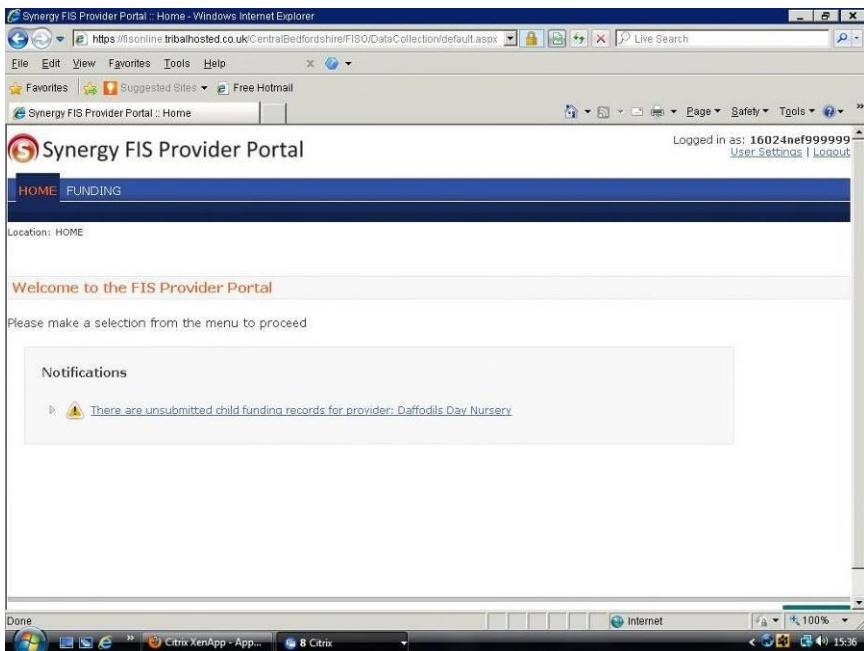
Once you have completed your Headcount return for the period you must select Submit. A message will pop up to let you know that the Submission has been successful.



Submission Successful

This will trigger an email to the cpeadmin@centralbedfordshire.gov.uk email inbox, to let the Business Support team know that a provider has submitted some information. When you look at your child list, you will see that there are messages in the status column against the children you have added, deleted or changed. Once these changes are authorised and accepted by the Business Support team, these messages will change to unchanged.

If you do not click on submit and logout of the provider portal, when you next log in you will be greeted with a message informing you that you have not yet submitted changes made to your children list.



4.3.6. Summary section

To view your estimates and actuals summary for a period, you first need to select the Summary menu.

- Select the View link of a particular period you would like to see. You will then be presented with a similar screen in the next screenshot picture.

Estimates		Actuals	
Term Length (Weeks)	14.00	Term Length (Weeks)	14.00
Hours Per Week	280.00	Funded Hrs (Term)	1796.00
Total Rate Per Hour	£3.75	Total Rate Per Hour	£3.75
Term Funding Amount	£14700.00	Sub Total (Hrs x Total Rate)	£6735.00
Interim %	75.00%	Child Weightings Total	£73.80
Interim Amount Due	£11025.00	Term Funding Amount	£6808.80
Adjustments Paid	£0.00	Interim Amount Paid (before Adj)	£11025.00
Interim Amount Paid (Inc. Adj)	£11025.00	Term Funding Amount Balance	(£4216.20)
Paid	Yes	Adjustments Paid	£0.00
Paid Date	01-Oct-2012	Actual Amount Paid (Inc. Adj)	£0.00
Return To Headcount Summary		Total Weekly Non-Funded Hours	39.00
		Paid	No
		Paid Date	

Please note that the figures represented in the actuals section are for the whole period. In order to calculate the monthly amount you need to divide the balance by 4. The first three payments in each term will total 75% of the number of hours on the providers estimate form. The fourth

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payment will be the final balancing payment based on the term's actual headcount of eligible children and any other adjustments.

On the screen you will notice arrows against Total Rate per Hour and Child Weightings Total. You can click on the arrows to show a breakdown of these figures. It will show your provider weightings if applicable i.e. Level 4 practitioner, Qualified Teacher Status or Early Years Professional status and if any children live in a deprived area. Please see below examples.

Term Length (Weeks)	14.00
Funded Hrs (Term)	444.00
▼ Total Rate Per Hour	£3.75
Base Rate	£3.65
Level 4 Practitioner	£0.10

Sub Total (Hrs x Total Rate)	£6735.00
▼ Child Weightings Total	£73.80
210.00 hrs on 1 child	£42.00
Social Deprivation 1 - 0 - 30% (£0.20)	
318.00 hrs on 2 children	£31.80
Social Deprivation 2 - 31 - 60% (£0.10)	